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<td>Manage Risk Notices</td>
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<td>View Details</td>
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<td>On the Intelligence page, click the desired risk notice. The details page appears.</td>
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<td>Contact Affected Users</td>
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</table>
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<table>
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<tr>
<th>Date</th>
<th>Notes / Comments / Changes</th>
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</thead>
<tbody>
<tr>
<td>October 29, 2020</td>
<td>Added a <em>Limitations and Deprecations</em> section</td>
</tr>
<tr>
<td>July 7, 2020</td>
<td>Added a note about the <strong>Transaction Location</strong> filter</td>
</tr>
<tr>
<td>June 4, 2020</td>
<td>Added information about COVID-19</td>
</tr>
<tr>
<td>February 4, 2020</td>
<td>Updated information for Color Indicators under the <em>Use the Intelligence Page</em> section</td>
</tr>
<tr>
<td>February 3, 2020</td>
<td>Updated Message description under <em>Send a One-Way Message to One or More Users</em> section</td>
</tr>
<tr>
<td>April 26, 2019</td>
<td>Made the following updates:</td>
</tr>
<tr>
<td></td>
<td>• Updated map screenshots with clear geo-fence area function</td>
</tr>
<tr>
<td></td>
<td>• Updated information on drawing tools and included new screenshot</td>
</tr>
<tr>
<td>February 18, 2019</td>
<td>Updated the copyright; no other changes; cover date not updated</td>
</tr>
<tr>
<td>November 16, 2018</td>
<td>Made the following updates:</td>
</tr>
<tr>
<td></td>
<td>• Added information about the Pilot Mode option</td>
</tr>
<tr>
<td></td>
<td>• Updated the SAP Concur naming convention</td>
</tr>
<tr>
<td></td>
<td>• Made modifications throughout</td>
</tr>
<tr>
<td>September 21, 2018</td>
<td>Updated the information about the <strong>Live</strong> checkbox.</td>
</tr>
<tr>
<td>May 1, 2018</td>
<td>Added information about:</td>
</tr>
<tr>
<td></td>
<td>• Branding text option</td>
</tr>
<tr>
<td></td>
<td>• Automatic refresh option for two-way communications</td>
</tr>
<tr>
<td></td>
<td>• Profiles with locations and all profiles search options</td>
</tr>
<tr>
<td></td>
<td>• Map display</td>
</tr>
<tr>
<td></td>
<td>• Mobile App Activated</td>
</tr>
<tr>
<td>March 29, 2018</td>
<td>Added information about:</td>
</tr>
<tr>
<td></td>
<td>• Delivery Status Indicators</td>
</tr>
<tr>
<td></td>
<td>• Delivery Channel Menu</td>
</tr>
<tr>
<td>March 12, 2018</td>
<td>Added information about:</td>
</tr>
<tr>
<td></td>
<td>• Temporary Locations</td>
</tr>
<tr>
<td></td>
<td>• Transaction Locations</td>
</tr>
<tr>
<td>March 9, 2018</td>
<td>Updated the copyright; no other changes; cover date not updated</td>
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<tr>
<td>December 17, 2017</td>
<td>Added:</td>
</tr>
<tr>
<td></td>
<td>• GDACS</td>
</tr>
<tr>
<td></td>
<td>• Day/Night View</td>
</tr>
<tr>
<td>Date</td>
<td>Notes / Comments / Changes</td>
</tr>
<tr>
<td>--------------------</td>
<td>------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>October 11 2017</td>
<td>Added information about:</td>
</tr>
<tr>
<td></td>
<td>• Export with itinerary</td>
</tr>
<tr>
<td></td>
<td>• Filter search results by delivery status and response</td>
</tr>
<tr>
<td></td>
<td>• Group search</td>
</tr>
<tr>
<td></td>
<td>• Search results &quot;text&quot; filter</td>
</tr>
</tbody>
</table>
Section 1: Permissions

A company administrator may or may not have the correct permissions to use this feature. The administrator may have limited permissions, for example, they can affect only certain groups and/or use only certain options (view but not create or edit).

If a company administrator needs to use this feature and does not have the proper permissions, they should contact the company’s SAP Concur administrator. Also, the administrator should be aware that some of the tasks described in this guide can be completed only by SAP Concur. In this case, the client must initiate a service request with SAP Concur Client support.

Section 2: Overview

Unplanned events such as weather, natural disasters, political unrest, product disruptions, or media events happen all the time. These events increase the need for companies to locate and communicate time-sensitive information with their employees. Concur Locate assists companies by providing employee location-related information – while they are at work and during business travel.

Concur Locate is a billable SAP Concur offering that is available to clients who also have Concur Expense and/or Concur Travel. Though it is not required, it is highly recommended that clients use Concur Travel’s online booking tool. Concur Locate collects traveler information (locations, itineraries, etc.) from TripIt, TripLink, and Concur Travel. Using Concur Travel provides the best possible results in locating employees.

Concur Locate enables companies to:

- Determine the current location of all employees – whether traveling or working in the office (including home office) based on the information in the user’s profile or travel data
- Send one-way messages via Text to Voice, SMS (text), and email

**NOTE:** The Text to Voice feature requires activation; it is not enabled by default.

- Send and receive two-way communications via SMS (text) and email, allowing users to check-in and request assistance
Concur Locate is initially available with a basic feature set, it will be enhanced over time to meet all the needs of clients seeking employee location identification solutions within the SAP Concur user interface.

**All Employees vs SAP Concur Users**

Not all employees in a company use an SAP Concur service, like Expense or Travel – but **all** employees can use Concur Locate. The requirements for all Concur Locate users are detailed on the following pages.

**NOTE:** Messaging to sponsored guests (feature in Concur Expense and Concur Travel) is supported. Currently, non-profiled travelers (feature in Concur Travel) are not fully supported.
Professional and Standard Editions

Concur Locate is available to Professional and Standard Edition customers. For the most part, Concur Locate is the same in both editions. Where there are differences, that information is called out in this guide.

About This Guide

This document describes how to:

- Enable Concur Locate
- Assign rights to administrators
- Set up users
- Administer Concur Locate

Important Information Regarding COVID-19

COVID-19 is a virus strain, first identified in Wuhan, Hubei Province, China, that has spread throughout the world since December 2019. It was declared a worldwide pandemic by the World Health Organization (WHO) on March 11, 2020.

**NOTE:** The following list - as it relates to COVID-19 - will be updated on an as-needed basis.

**FAQ**

**Q.** How can Concur Locate / Risk Messaging help fight the outbreak?

**A.** Concur Locate can be leveraged in the following ways:

- Search for employees around the world where the outbreak is most prevalent. Once employees are found, Concur Locate can be used to communicate with these employees quickly via email, SMS, or the Concur mobile app, to offer travel and safety advice.

- Determine any future travel to high risk countries, and to inform employees to postpone or cancel those travel plans.

- Find out retroactively if someone had traveled to a country that is just now determined to be a source of the outbreak, inform them to seek medical attention where necessary.

**NOTE:** Companies can set up their own messages for any country through Country-Policy Rules and then have their own (limited) text with links for the latest information.
Q. How do I find out who is traveling where and when?

A. There are two ways to search for employees using Concur Locate and Risk Messaging:

- **Reports**: Reports provide with you with employee travel itineraries so you can search and filter on any high risk travel by country and city. Many countries report their own COVID-19 impact, and institute their own travel restrictions and quarantine laws. Reports help you determine how your employees are impacted country by country.

- **Map search**: Using the Search tab in Concur Locate or MapCast in Risk Messaging, allows you to have a quick glance at where your employees are around the world, whether traveling or at the office. The map is useful for determining the geo-proximity of your employees to clusters of infections, such as those recently reported in Wuhan/China, Tehran/Iran, and Milan/Italy.

Q. Which reports can help me find my employees?

A. Risk Messaging offers a standard set of travel reports that provide information on where your employees are and when they are traveling. They include:

- **Country Travel**: This report shows which countries your employees visit over a specified period of time and risk exposure by country. You can filter by country. It contains flight and hotel segments only. Use this report to discourage or ban travel to high risk countries.

- **Travel Days in Country**: This report highlights how many days an individual has been in or is planning to be in all countries round the world within a specified period of time. In cases where business travel is still deemed essential, use this report to determine risk exposure by location and duration.

- **High Risk Travel**: Similar to the Country Travel report, except pre-filtered to all countries with overall risk ratings of 3 and above only

- **Travel Request to Booking**: Displays all travel requests from Concur Request, and any subsequent confirmed bookings that originate from the requests. This report helps you to proactively detect any intended travel to high risk countries prior to finalizing bookings, so you can take steps to postpone, cancel, or deny.

- **Segment**: Displays all travel segments over a period of time, exposure to risks by travel segment type and country. Includes all segment types: air, hotel, car, train. This report can help determine risk exposure by location (country and city level), and length of time (start/end date/time of each individual travel segment).

**Limitations and Deprecations**

As of January 31, 2021, Amex and Uber integrations with Concur Locate will be fully deprecated.
Section 3: Enable Concur Locate

Companies contact SAP Concur to enable Concur Locate. SAP Concur enables the appropriate module for the client.

Section 4: Assign Rights to Administrators

SAP Concur assigns the proper administrative permissions to one or more of the company's employees. Once assigned the proper permissions, Locate Administrators can create and review all messaging, locations, risk data, etc. as detailed later in this guide.

Section 5: Set Up Users

There is no role/permission for users; by default, every employee can use Concur Locate – so all employees are potentially Concur Locate users. Specific information must be present in the user's profile or travel data in order for Concur Locate to be able to communicate with users.

For example:

- An email address must be listed in the Email 1 field in the user's profile.
- In order to send and receive SMS (text) messages, a mobile device must be listed – and opted-in – in the user's profile. The user can add multiple mobile numbers but only the one designated as the primary mobile phone is used to send/receive SMS messages.
- For Text to Voice messages, the message is sent to the mobile number. If there is no mobile device number in Profile, then the message is sent to the work phone number.
- Concur Locate uses the address in the Work Address fields in the user's profile to locate users. If remote employees enter their remote address as the work address, then Locate use that address. Locate does not use the home address fields in Profile.
- If the user does not have a SAP Concur profile, then Concur Locate uses the name, email address, and mobile number associated with the travel data.
- Concur Travel traveler arrangers (identified in profile for users of Concur Travel) are not sent notifications for their travelers.
Section 6: Administer Concur Locate

As an admin, once you have the proper permissions, the Locate menu appears.

The following pages are available:

- Search
- Communication
- Intelligence

Each Concur Locate page is discussed on the following pages in this guide.
Section 7: Use the Search Page

Use the Search page to:

- Define your settings
- Locate users using a search field and date range
- Search by address or location
- Refine your search using geo-fence drawing tools, view, zoom, and filters
- Send messages and request status
- Add one or more users to a group
- Export information for one or more users
- Access user information (profile, itinerary, message history)
Define Your Settings

Use the top portion of the page to select:

- Company level or sub-level
- Time zone you are using

Choose the Company Level/Sub-Level

On the Search page, you can search for the desired company level. Generally, the sub-levels are countries, which are defined by the country digit of the user’s mobile number. The countries may be further defined by the user’s work location.

To search by level:

In the Level list, select the desired level or sub-level.
Section 7: Use the Search Page

Select Your Time Zone

Select your time zone.

- **To select a time zone:**

In the **My Time Zone** list, select the desired time zone.

![Time Zone Selection](image)

Locate Users using a Search Field and Date Range

Use the search area of the page to:

- Use the **Search By** field
- Define a date and time range

![Search Area](image)
Use the "Search By" Field

On the top of the page is the Search By field.

To use the Search By field:

1. Click the Search By list.

1. Select the desired option.

<table>
<thead>
<tr>
<th>Option</th>
<th>Notes / Comments / Changes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profiles with locations</td>
<td>Select Profiles with locations. You can leave the search field blank or type in the desired search information into the search field. If looking for a specific profile, you can continue to use the full or partial name.</td>
</tr>
<tr>
<td>All profiles</td>
<td>Select All profiles. You can leave the search field blank or type in the desired search information into the search field, like record locator, flight number, etc.</td>
</tr>
<tr>
<td>Booking/PNR</td>
<td>Booking/PNR includes:</td>
</tr>
<tr>
<td></td>
<td>• Record Locator</td>
</tr>
<tr>
<td></td>
<td>• Concur Request ID (if applicable)</td>
</tr>
<tr>
<td></td>
<td>• TripLink Identifier</td>
</tr>
<tr>
<td></td>
<td>Select Booking/PNR then type the record locator, Request ID, or TripLink identifier in the search field.</td>
</tr>
<tr>
<td>Flight/Rail</td>
<td>Select Flight/Rail and then type the appropriate flight/train information in the search field.</td>
</tr>
</tbody>
</table>
Section 7: Use the Search Page

<table>
<thead>
<tr>
<th>Option</th>
<th>Notes / Comments / Changes</th>
</tr>
</thead>
</table>
| Group  | Select Group and then type the name of the desired group.  
For more group information, use the steps detailed in View All Members of a Group and Remove One or More Users From a Group in the Access Complete User Information (Profile, Itinerary, Message History) section in this guide. |

2. Click **Search**. The search results (including geographical markers or "pins") appear on the map.

**NOTE:** After you click the **Search** button, the map will appear.

For a description of the geographical markers (pins) and other user information, refer to the Access User Information and Send Messages section in this guide.

**Define a Date Range**

Use the current date or define a date range for your search.

- **To select dates:**

Do one of these:

- Select (enable) the **Live** check box. Concur Locate auto-populates the start date as *today at 12:00 AM* and the end date as *today at 11:59 PM*.
- Clear (disable) the **Live** check box. Enter the desired start and end dates and times.

**Search by Address or Location**

Use the **Find an address or a location** field to search for a specific location.

- **To search by address or location:**

1. In the **Find an address or a location** field, enter the desired address or location.
2. Click 🔍.
Section 7: Use the Search Page

The location appears on the map.
Refine Your Search Using Drawing Tools, View, Zoom, and Filters

Use Geo-Fence Drawing Tools

Use the geo-fence drawing tools to highlight specific areas. You can create a circle, box, or free-form area. Click the X to clear the drawing area.

To use the circle or box tool:

1. Click the circle or box tool.
2. On the map, click where you want the center of the circle or square.
3. Drag to the desired size.
Section 7: Use the Search Page

- **To use the free-form tool:**
  4. Click the free-form tool.
  5. On the map, click and drag to form the desired shape.

**Use Views**

Use the **Road, Satellite**, or **Hybrid** views to perform a search. The default option is **Road**, which shows street-level views.

Road, satellite, and hybrid views work like any standard online map.

Road view:
Satellite view:

Hybrid view:

**Use Zoom**

Zoom in and out work like any standard online map.

Click the 🏡 icon to return to the default zoom size.
Use Filters

On the right side of the map are the filters you can use to filter the search results.

- **To filter the search results:**
  1. Click the icon in the upper-right corner of the map.
  2. Click the desired icon.

**NOTE:** Click the icon to turn the filter off and on.

<table>
<thead>
<tr>
<th>Option</th>
<th>Notes / Comments / Changes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Severity Levels</td>
<td>The severity level (and color) appears by country. The color and the severity level are determined by your company’s risk information provider.</td>
</tr>
<tr>
<td>GDACS</td>
<td>Refer to the GDACS section below.</td>
</tr>
<tr>
<td>Day and Night</td>
<td>Refer to the Day and Night section below.</td>
</tr>
<tr>
<td>Option</td>
<td>Notes / Comments / Changes</td>
</tr>
<tr>
<td>----------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Airports</td>
<td>Find users passing through an airport – catching an outbound, connecting, or return flight. Concur Locate collects the location information from Concur Travel, TripIt, and TripLink itineraries and/or other booking sources.</td>
</tr>
<tr>
<td>Hotels</td>
<td>Find users who are scheduled to stay (between check-in and check-out dates) at a hotel. Concur Locate collects the location information from Concur Travel, TripIt, and TripLink itineraries and/or other bookings.</td>
</tr>
<tr>
<td>Rail Stations</td>
<td>Find users catching an outbound, connecting, or return train trip. Concur Locate collects the location information from Concur Travel, TripIt, and TripLink itineraries.</td>
</tr>
<tr>
<td>Approved Requests</td>
<td>Find users who have approved travel requests from Concur Request. Note that the trip may not yet be ticketed; it might only be approved.</td>
</tr>
<tr>
<td>Check-Ins</td>
<td>Find users who have checked-in using the SAP Concur mobile app.</td>
</tr>
<tr>
<td>Office Locations</td>
<td>Find users who have an office location listed in their profile. Concur Locate collects the location information from the <strong>Work Address</strong> fields in Profile.</td>
</tr>
<tr>
<td>Temporary Locations</td>
<td>Show/hide user locations received from the Concur Locate API. This data may be received from third party location registries, such as student travel programs. Note this option is automatically off for all customers and will be visible in the filter list but it is not yet available; it will not yet affect search results.</td>
</tr>
<tr>
<td>Transaction Locations</td>
<td>Show/hide data from employee transactions, such as qualified expense transactions. Note this option is automatically off for all customers and will be visible in the filter list but it is not yet available; it will not yet affect search results. <strong>NOTE:</strong> Concur Locate has the capability of collecting American Express corporate transaction data, however other cards are not supported.</td>
</tr>
</tbody>
</table>

3. Select the **Only show last known location** check box to view a user’s last known location. The user’s last known location will appear as a geographic marker on the map.

4. Select the **Pilot Mode** check box to view users on the map whose sites/subsites are only in pilot mode.

**NOTE:** When the **Pilot Mode** check box is cleared (disabled), only users in sites/subsites - that are designated as live - are displayed.
GDACS (GLOBAL DISASTER ALERT AND COORDINATION SYSTEM) FILTER

The GDACS data feed gives you the ability to overlay the map with icons representing major disasters and their impact. In addition, there is a link to the GDACS website where additional details about the event can be found.

GDACS is a cooperation framework under the United Nations umbrella. It includes disaster managers and disaster information systems worldwide and aims at filling the information and coordination gap in the first phase after major disasters.
**Day and Night View**

It is very useful to know whether it is day or night around the globe, especially when sending out messages. Click the Day and Night icon to see day/night information on the map.

Send Messages and Request Status

Select one or more users from the user list below the map. Above the map, **Send a Message** and **Request Status** become available.

**Send a One-Way Message to One or More Users**

- **To send a one-way message to one or more users:**
  1. Below the map, select one or more users.
Section 7: Use the Search Page

2. Above the map, click **Send a Message**. The **New Message** window appears.

![New Message window]

3. Make the appropriate choices.

<table>
<thead>
<tr>
<th>Field / Section</th>
<th>Description / Action</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Delivery channel</strong></td>
<td>Select one or more of these:</td>
</tr>
<tr>
<td></td>
<td>• <strong>All channels</strong>: With this option, messages are sent via the mobile app, SMS, and email.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Best enabled channel</strong>: With this option, the system determines which channel to send the message based on the following logic:</td>
</tr>
<tr>
<td></td>
<td>‣ Send via the SAP Concur mobile app (if the company uses the mobile app)</td>
</tr>
<tr>
<td></td>
<td>‣ Otherwise, send via SMS (if opted in where applicable)</td>
</tr>
<tr>
<td></td>
<td>‣ If neither the mobile app nor SMS is enabled, then send via email</td>
</tr>
<tr>
<td></td>
<td>• <strong>Email only</strong>: With this option, messages are sent via email only.</td>
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<tr>
<td></td>
<td><strong>NOTE</strong>: Text to Voice appears if it is available for your company.</td>
</tr>
<tr>
<td><strong>Override OPT OUT</strong></td>
<td>Select (enable) the <strong>Include individuals who have opted out of receiving text messages</strong> check box to send this message to all selected users – even those who have opted out of receiving messages.</td>
</tr>
<tr>
<td></td>
<td>The message is sent via SMS if a mobile number is in the user's profile. If not, it is sent via email.</td>
</tr>
<tr>
<td><strong>Delivery Time</strong></td>
<td>Either:</td>
</tr>
<tr>
<td></td>
<td>• Select the <strong>Immediately</strong> check box.</td>
</tr>
<tr>
<td></td>
<td>– <strong>or</strong> –</td>
</tr>
<tr>
<td></td>
<td>• Enter a delivery time.</td>
</tr>
<tr>
<td><strong>Subject</strong></td>
<td>Enter the message subject.</td>
</tr>
</tbody>
</table>
### Field / Section | Description / Action
--- | ---
Recipients | Select the desired recipients. **NOTE:** You can remove one or more recipients from a message by selecting the desired recipients and then clicking **Remove.**

Branding Text | Select (enable) the **Add configured branding text to the start of each message** check box to add your company's branding text before each message. **NOTE:** If there is no branding text added at the subsite level, the branding from the top level will be utilized. If no branding text is specified, none will be shown.

Message | Enter the message text. The maximum is 460 characters. If you try to copy and paste text that exceeds 460 characters, the text will not appear in this field.

4. Click **Send.**

**Send a Two-Way Status Request to One or More Users**

- **To send a two-way status request to one or more users:**
  1. Below the map, select one or more users.
  2. Above the map, click **Request Status.** The **New Status Request** window appears.

![New Status Request window](image)

3. Complete the fields as detailed in the **Send a One-Way Message to One or More Users** section of this guide.

**NOTE:** Status requests do not include the Text to Voice message option.
4. Click **Send and Monitor**.

**Add One or More Users to a Group**

You can add one or more users to one or more groups.

- **To add one or more users to one or more groups:**
  1. Below the map, select one or more users.
  2. Above the map, click **Add to a Group**. The group options appear.

![Add to Group](image)

3. To add a user to an existing group:
4. To add a user to a new group:
   - Click **Create New Group**.
   - In the **Name** field, enter the appropriate group name.
   - In the **Description** field, enter the appropriate description.
   - Click **Add to Group**.
View All Members of a Group; Remove One or More Users From a Group

There are additional group-related tasks you can perform but they are not available from this page.

Use the steps detailed in View All Members of a Group and Remove One or More Users From a Group in the Access Complete User Information (Profile, Itinerary, Message History) section in this guide.

Export Information for One or More Users

You can export data with or without an itinerary, in CSV or Excel format.

To export information for one or more users:

1. Below the map, select one or more users.
2. Above the map, click one of these:
   - More Options > Export as CSV
   - More Options > Export with itinerary as CSV
   - More Options > Export with itinerary as Excel
3. Depending on your browser, follow the proper steps to save the file.
Access User Information

Use Geographical Markers (Pins)

In the search results, the "located" users (search results) are represented with geographical markers ("pins") on the map. The icons on the markers indicate airport, hotel, mobile device, rail station, etc.

An easy way to see the description of the icons is to click the filter icon in the upper-right corner of the map.
The filters section opens, listing the different icons.

To view user location information on the map:

1. On the map, click the desired geographical marker. The Traveler Details window appears.
2. If there is more than one user in a location, the number of users is located in the upper-left corner. Click the arrow buttons to view the desired user location information.

This information appears:
- Name
- Email
- Mobile
- Employee ID
- Level
- Start and end times
- Location

3. You can also:
- Click the Zoom to link or in the lower-left corner to go directly to the user's location on the map.
- Click the user's name to access the user's profile page.
Access Complete User Information (Profile, Itinerary, Message History)

On the Search page, below the map is a list of all users represented in the search results. If you change the search filters, which changes the search results, the user information below the map is automatically refreshed.

**VIEW USERS**

*To view a user’s information page:*

In the user list, click the desired user’s name (link).
The user's information page appears.

There are three main sections, as described on the following pages:

<table>
<thead>
<tr>
<th>Section</th>
<th>Use to</th>
</tr>
</thead>
<tbody>
<tr>
<td>User details (left side of the page)</td>
<td>View user details</td>
</tr>
<tr>
<td><strong>Itinerary</strong> tab</td>
<td>View the current itinerary</td>
</tr>
<tr>
<td></td>
<td>Search for additional itineraries</td>
</tr>
<tr>
<td><strong>Message History</strong> tab</td>
<td>View past messages</td>
</tr>
<tr>
<td></td>
<td>Send an email, SMS, Text to Voice, or All</td>
</tr>
</tbody>
</table>

**VIEW USER DETAILS – LEFT SIDE OF THE PAGE**
The following information appears if the information is available:

<table>
<thead>
<tr>
<th>User Details</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Profile</strong></td>
<td></td>
</tr>
<tr>
<td>Company</td>
<td>This information is added during the implementation process.</td>
</tr>
<tr>
<td><strong>Contact</strong></td>
<td></td>
</tr>
<tr>
<td>Mobile Phone, Opt in</td>
<td>This information is from the Mobile Devices fields in the Contact Information section of the user’s profile. Only the device noted as primary is used by Concur Locate.</td>
</tr>
<tr>
<td>Mobile App Activated</td>
<td>This information is from the Mobile Devices fields in the Contact Information section of the user’s profile. Indicates when a user is using the SAP Concur mobile app.</td>
</tr>
<tr>
<td>Home Phone</td>
<td>This information is from the Home Phone fields in the Contact Information section of the user’s profile.</td>
</tr>
<tr>
<td>Email</td>
<td>This information is from the Email 1 field in the Contact Information section of the user’s profile.</td>
</tr>
<tr>
<td>Groups</td>
<td>Messaging group, if any.</td>
</tr>
</tbody>
</table>

**VIEW THE CURRENT ITINERARY – ITINERARY TAB**

On the Itinerary tab, you can view a user’s itinerary.

**SEARCH FOR ADDITIONAL ITINERARIES – ITINERARY TAB**

Use the date range area above the Itinerary tab to view additional user itineraries.
**VIEW MESSAGES – MESSAGE HISTORY TAB**

On the **Message History** tab, you can view a user’s message history.

![Image of Message History tab]

**SEND A MESSAGE – MESSAGE HISTORY TAB**

You can send a message to this user.

- **To send a message:**
  1. Enter the appropriate message.
  2. Select the following options:
     - SMS
     - Email
     - Text to Voice (if available)
     - All
  3. Click **Send a Message**.
ADD THE CURRENT USER TO A GROUP

Use the steps detailed in *Add One or More Users to a Group* in the *Use the Search Page* section in this guide.

VIEW ALL MEMBERS OF A GROUP

On the group details page, you can view all the users in a group.

▶ *To view a group details page:*

On the user's details page, click the appropriate group (link) in the **Contact** section.

The group details page appears.
The members of the group appear below the map.

**SEND A MESSAGE, REQUEST STATUS, ETC.**

On the group details page, you can complete most of the tasks as on the Search page.

Refer to the Use the Search Page section in this guide.

**REMOVE ONE OR MORE USERS FROM A GROUP**

*To remove one or more users:*

1. Below the map, select one or more users.
2. Above the map, click Remove from Group.

### Section 8: Use the Communication Page

#### Overview

On the Communication page, you can view existing messages and responses to alerts. This page also shows whether an email or text message is delivered to the recipients and indicates if the user received or read the message.

With real-time mapping, you can quickly monitor your users.
On the **Communication** page, you can:

- Define your settings
- Define the date range
- Filter by message type and message status
- Manage information messages
- Manage status requests
- Manage assistance requests
- Set user status
- Close a case (Status request, Assistance request)

### Define Your Settings

Use the steps detailed in *Define Your Settings* in the *Use the Search Page* section in this guide.

### Define the Date Range

- **To define the date range:**

  Do one of these:

  - Select (enable) the *Live* check box. Concur Locate auto-populates the start date as today *minus* seven days and the end date as today *plus* seven days.
  - or –
  - Clear (disable) the *Live* check box. Enter the desired start and end dates.

### Filter by Message Type and Message Status

You can filter by:

- **Message type:**
  - Information
  - Status request
  - Assistance request
  - All
- **Message status:**
  - Open
  - Closed
  - All
Section 8: Use the Communication Page

To filter:

1. Select the desired option.
2. Click Search.

Manage Information Messages

On the Communication page, you can view information messages, which are one-way message that do not require a response.
People Messaged

You can instantly view how many users have received your messages in the People Messaged section.

The message types include:

- SMS
- Emails
- Text to Voice (if available)
- Not Contacted

View Details

- To view information message details:

On the Communication page, click the name of the information message. The details page appears.

Filter

You can filter the search results by delivery status:

- All messages
- SMS Delivered
- SMS Undelivered
To filter:

1. Select the desired option.
2. Click Search.

Contact Affected Users

Use the steps detailed in Send Messages and Request Status in the Use the Search Page section of this guide.

Other Common Tasks

On this page, you can:

- **Add one or more users to a group**: Use the steps detailed in Add One or More Users to a Group in the Use the Search Page section in this guide.

- **Export information for one or more users**: Use the steps detailed Export Information for One or More Users in the Use the Search Page section in this guide.

Manage Status Requests

On the Communication page, you can view status request messages.
Responses

You can quickly view user responses to your messages in the Responses section.

The response types include:
- Other Response
- No Response
- Status OK

Note the following:
- If the user responds "OK" via SMS then Concur Locate automatically sets that user to Status OK.
- If the user responds with anything other than "OK" – like "I'm fine" – via SMS then Concur Locate automatically sets that user to Other Response.
- You can also manually set the user to Status OK (and add a comment), for example, if the user calls or emails you instead of responding via SMS.

People Messaged

You can instantly view how many users have received your messages in the People Messaged section.
Section 8: Use the Communication Page

NOTE: Automatic messages are sent out 24 hours a day.

The message types include:
- SMS
- Emails
- Text to Voice (if available)
- Not Contacted

View Details

To view status request details:

On the Communication page, click the name of the status request. The details page appears.

When available, you can also view the user responses in the user’s list.
Filter

You can filter the search results by:

- Responses:
  - All Responses
  - Other Response
  - No Response
  - Status OK
- Delivery status:
  - All messages
  - SMS Delivered
  - SMS Undelivered

To filter:
1. Select the desired option.
2. Click Search.

Auto Refresh

To auto refresh two-way messages:

On the status request details page, select (enable) the Auto Refresh check box.

NOTE: Once selected, the system will refresh the screen every 30 seconds to display the latest responses without any additional interaction required.
Contact Affected Users

Use the steps detailed in *Send Messages and Request Status* in the *Use the Search Page* section of this guide.

**Other Common Tasks**

On this page, you can:

- **Add one or more users to a group:** Use the steps detailed in *Add One or More Users to a Group* in the *Use the Search Page* section in this guide.

- **Export information for one or more users:** Use the steps detailed *Export Information for One or More Users* in the *Use the Search Page* section in this guide.

Manage Assistance Requests

On the **Communication** page, you can manage in-coming assistance requests from affected users.
**View Details**

- **To view assistance request details:**

  From the **Communication** page, click the name of the assistance request. The details page appears.

![Communication Page Screenshot](image)

**Contact Affected Users**

Use the steps detailed in *Send Messages and Request Status* in the *Use the Search Page* section of this guide.

**Other Common Tasks**

On this page, you can:

- **Add one or more users to a group:** Use the steps detailed in *Add One or More Users to a Group* in the *Use the Search Page* section in this guide.

- **Export information for one or more users:** Use the steps detailed *Export Information for One or More Users* in the *Use the Search Page* section in this guide.
Set a User’s Status (Status Request, Assistance Request)

On the Communication page, you can update a user’s status.

Each status is represented by a color bar that appears (on the right) of each user in the list. The corresponding colors are listed below:

<table>
<thead>
<tr>
<th>Status</th>
<th>Color</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other Response</td>
<td>Red</td>
</tr>
<tr>
<td>No Response</td>
<td>Yellow</td>
</tr>
<tr>
<td>Status OK</td>
<td>Green</td>
</tr>
</tbody>
</table>

To select a status:

1. In the user list, select the appropriate user.

2. Click Set Status.

3. Select the appropriate user’s status from the list.
Section 8: Use the Communication Page

Close a Case (Status Request, Assistance Request)

Once all affected user statuses are set to OK, you can report that everyone is safe by closing a case.

- **To close a case:**

On the associated message page, click **Close**.

![Close a Case Example](image)
Section 9: Use the Intelligence Page

Overview

During the implementation process, your company will define the supported content that they want to include (e.g. Flightstats).

On the Intelligence page, you can view risk content. The content options are defined by your company's risk content provider. Here are general definitions; however, contact your risk content provider for exact definitions.

<table>
<thead>
<tr>
<th>Option</th>
<th>Notes / Comments / Changes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Risk alerts</td>
<td>In the case of a major incident, such as a bombing, an automated information service instantly delivers a SMS message to all users with planned activity in that destination within the next 2 days and advice on what they should do. Message delivery is based on a pre-determined risk threshold level (1-5). HR/Security or other designated individuals are also sent an email notifying them of which users are affected.</td>
</tr>
</tbody>
</table>
Define the Date Range

To define the date range:

Do one of these:

- Select (enable) the Live check box. Concur Locate auto-populates the start date as today minus seven days and the end date as today.

- or -

- Clear (disable) the Live check box. Enter the desired start and end dates.

Filter by Severity Level, Event Type, Country, and Text

You can filter the messages by severity, event type, country, and text.

To filter by severity, event type, country:

1. Select the desired option.
2. Click Search.
Section 9: Use the Intelligence Page

- To filter by text:
  1. In the Filter field, type the desired text, such as tower, flood, Las Vegas.
  2. Press Enter.

Indicators

Color Indicators

On the Intelligence page, color bars appear to the left of each risk type in the list.
The colors are defined by your company’s risk content provider; they cannot be edited within Concur Travel. Here is an example; however, contact your risk content provider for exact definitions.

### Delivery Status Indicators

On the **Intelligence** page, a red image appears on top of the channel icon indicating when a message cannot be delivered to a user.

<table>
<thead>
<tr>
<th>Risk Level</th>
<th>Characteristics</th>
<th>Sample Incident</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extreme (Level 5)</td>
<td>Travelers will certainly encounter serious risk to safety</td>
<td>Militia violence in Afmadow town, Somalia</td>
</tr>
<tr>
<td>High (Level 4)</td>
<td>Travelers will likely encounter serious risk to safety</td>
<td>French aid workers kidnapped in Birao, Central African Republic</td>
</tr>
<tr>
<td>Medium (Level 3)</td>
<td>Serious and violent hazards to personal safety exist, but are often localised, and the probability of encountering them is less than 50%</td>
<td>Planned student protests follow violent unrest outside National Assembly building, Nicaragua</td>
</tr>
<tr>
<td>Guarded (Level 2)</td>
<td>One-off incidents/Potential security risks/Travelers should remain vigilant</td>
<td>Authorities warn of potential terrorist threat in Sharon area, Israel</td>
</tr>
<tr>
<td>Low (Level 1)</td>
<td>Transportation disruptions/Incidents where travelers stand less than a 5% chance of being affected</td>
<td>Independent unions stage nationwide general strike, Italy</td>
</tr>
</tbody>
</table>

### Manage Risk Alerts

Risk Alerts are sent automatically; it requires no admin intervention. Depending on the company’s configuration, these alerts could go directly to the end users or to designated individuals.
On the **Intelligence** page, you can find risk alert information.
**View Risk Alert Emails**

After an alert has been sent out, you will automatically receive an email.

The alert email contains the following risk alert information:

<table>
<thead>
<tr>
<th>Email Contents</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject line</td>
<td>Risk alert information and updates</td>
</tr>
<tr>
<td>Severity level</td>
<td>Severity level number and country</td>
</tr>
<tr>
<td>Summary</td>
<td>Summary contains the alert details</td>
</tr>
<tr>
<td>Advice</td>
<td>Instructions on how to handle the risk situation</td>
</tr>
</tbody>
</table>
### Email Contents

<table>
<thead>
<tr>
<th>Description</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travellers may be affected</td>
<td>The users affected section includes:</td>
</tr>
<tr>
<td></td>
<td>• Users alerted by SMS or/or email</td>
</tr>
<tr>
<td></td>
<td>• Users currently at the location affected by the risk</td>
</tr>
<tr>
<td></td>
<td>• Users scheduled for departure in 0-4 hours, 4-12 hours, and 12+ hours</td>
</tr>
<tr>
<td>Departing in 0-4 hours, etc.</td>
<td>Below the <strong>View Incident in Concur</strong> button lists the users affected by the alert.</td>
</tr>
</tbody>
</table>

In the alert email, click **View Incident in Concur** to view the details page, as described below.

### View Details

There are two ways to access risk alert details.

- **To view a risk alert:**

  Either:
  - On the **Intelligence** page, click the desired risk alert.
  - or -
  - In the risk alert email, click **View Incident in Concur**.
The details page appears.

**Contact Affected Users**

Use the steps detailed in *Send Messages and Request Status* in the *Use the Search Page* section of this guide.

**Other Common Tasks**

On this page, you can:

- **Add one or more users to a group:** Use the steps detailed in *Add One or More Users to a Group* in the *Use the Search Page* section in this guide.
- **Export information for one or more users:** Use the steps detailed *Export Information for One or More Users* in the *Use the Search Page* section in this guide.
Manage Risk Notices

Risk Notices are sent automatically; it requires no admin intervention. Depending on the configuration, these notices could go directly to the end users or to designated individuals.

On the Intelligence page, you can find risk notice information.

View Details

- To view a risk notice:

On the Intelligence page, click the desired risk notice. The details page appears. Contact Affected Users
Section 9: Use the Intelligence Page

Use the steps detailed in **Send Messages and Request Status** in the **Use the Search Page** section of this guide.

**Other Common Tasks**

On this page, you can:

- **Add one or more users to a group**: Use the steps detailed in **Add One or More Users to a Group** in the **Use the Search Page** section in this guide.
• **Export information for one or more users:** Use the steps detailed *Export Information for One or More Users* in the *Use the Search Page* section in this guide.

**Manage Risk Summaries**

The Risk Summary provides a high-level overview of the country with the current risk rating.

Example:

Brazil is considered a MEDIUM risk travel destination. Countries classified as Medium Risk are not fully secure. These countries are in constant tension and vulnerable to sporadic unrest. Unexpected developments may threaten personal safety.

On the **Intelligence** page, you can find risk summary information.
View Details

To view a risk alert:

On the Intelligence page, click the desired risk summary. The details page appears.

Manage Flight Cancellations

Depending on your company’s configuration, these alerts could go directly to the end users or to designated individuals.

On the Intelligence page, you can find flight cancellation information.
View Details

**To view flight cancellation details:**

On the **Intelligence** page, click the desired flight cancellation. The details page appears.
Section 9: Use the Intelligence Page

**Contact Affected Users**

Use the steps detailed in *Send Messages and Request Status* in the *Use the Search Page* section of this guide.

**Other Common Tasks**

On this page, you can:

- **Add one or more users to a group:** Use the steps detailed in *Add One or More Users to a Group* in the *Use the Search Page* section in this guide.

- **Export information for one or more users:** Use the steps detailed *Export Information for One or More Users* in the *Use the Search Page* section in this guide.

**Manage Flight Delays**

If a flight is delayed more than 30 minutes, depending on your company’s configuration, these alerts could go directly to the end users or to designated individuals.

On the *Intelligence* page, you can find flight delay information.
View Details

To view a flight delay:

On the Intelligence page, click the desired flight delay message. The details page appears.
Section 9: Use the Intelligence Page

Contact Affected Users

Use the steps detailed in Send Messages and Request Status in the Use the Search Page section of this guide.

Other Common Tasks

On this page, you can:

- **Add one or more users to a group:** Use the steps detailed in Add One or More Users to a Group in the Use the Search Page section in this guide.

- **Export information for one or more users:** Use the steps detailed Export Information for One or More Users in the Use the Search Page section in this guide.